

**Effectiveness Wheel  
Action Planning Pro-forma**

| Where does responsibility for bringing about change in each of these areas lie?<br>Tick ✓ the box(es) as appropriate: | Company? | Department<br>or Team? | Me? | Actions |
|---|----------|------------------------|-----|---------|
| 1. Understanding personal effectiveness   |          |                        |     |         |
| 2. Setting and achieving SMARTER goals  |          |                        |     |         |
| 3. Identifying core activities  |          |                        |     |         |
| 4. Identifying core roles and responsibilities  |          |                        |     |         |
| 5. Planning and prioritising  |          |                        |     |         |
| 6. Using implementation tools   |          |                        |     |         |
| 7. Planning my time   |          |                        |     |         |
| 8. Delegating   |          |                        |     |         |
| 9. Attending effective meetings   |          |                        |     |         |
| 10. Being personally organised  |          |                        |     |         |
| 11. Controlling interruptions   |          |                        |     |         |
| 12. Communicating with others   |          |                        |     |         |
| 13. Working away from the office  |          |                        |     |         |
| 14. Avoiding procrastination  |          |                        |     |         |
| 15. Getting the best from email   |          |                        |     |         |
| 16. Maintaining energy levels   |          |                        |     |         |
| 17. Focusing and concentrating  |          |                        |     |         |
| 18. Coping with change  |          |                        |     |         |
| 19. Feeling in control by managing time   |          |                        |     |         |
| 20. Achieving work / life balance   |          |                        |     |         |
|   |          |                        |     |         |
|   |          |                        |     |         |
|   |          |                        |     |         |